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photo: Skoda Auto Octavia

World Diesel Engines

Industry Study with Forecasts for **2015 & 2020**

Study #2864 | April 2012 | $5900 | 478 pages

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Industry Study with Forecasts for ***2015 & 2020***

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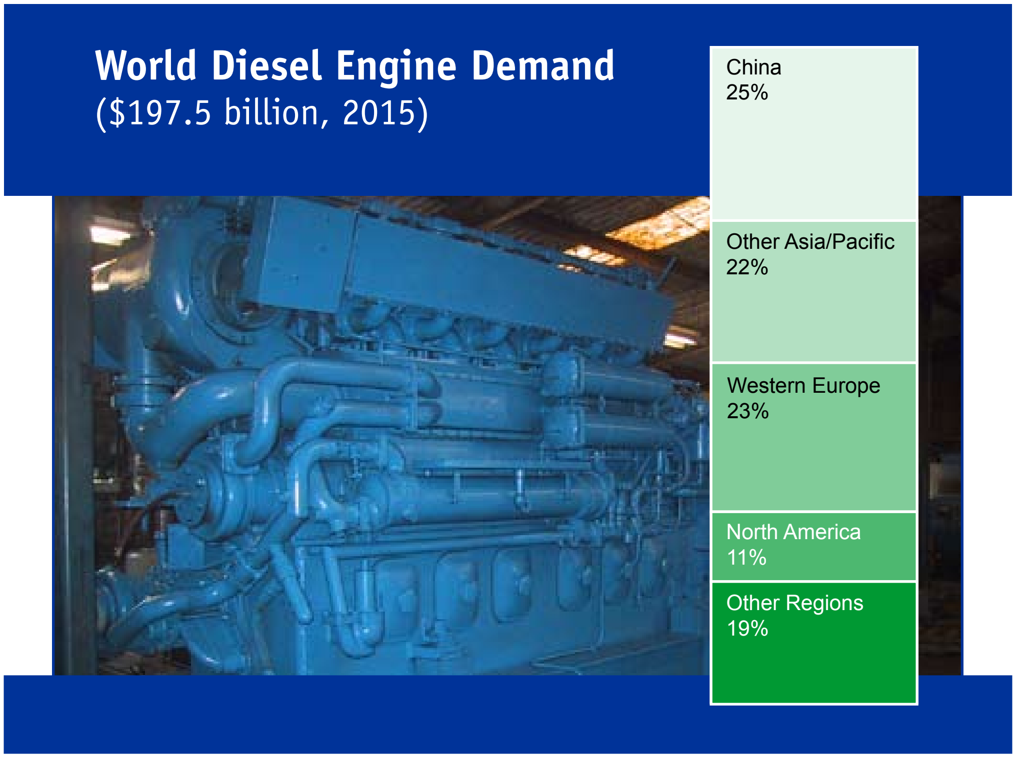
World diesel engine sales through 2015 will be driven by an increase in the production of motor vehicles, particularly medium and heavy trucks and buses.

World demand to rise 6.7% annually through 2015

World demand for diesel engines is projected to grow 6.7 percent per year through 2015 to $197.5 billion. Product sales will be driven by an increase in the production of motor vehicles, particularly medium and heavy trucks and buses. Value gains will also be fueled by the growing use of more technologically advanced, higher value products because of increasingly restrictive emission controls in a number of regions.

Asia/Pacific region to offer best growth opportunities

The Asia/Pacific region was the world's largest market for diesel engines in 2010 by a wide margin. China and India will be the primary drivers for growth in the region, as expanding output of motor vehicles and off-highway equipment combine with higher levels of fixed investment to stimulate significant increases in diesel engine demand. Sales of diesel engines in the region are expected to grow 7.7 percent per year through 2015, with China alone accounting for one-third of the increase in global demand between 2010 and 2015. The medium and heavy vehicle diesel engine segment will experience the greatest gains in this regional market in dollar terms, accounting for 53 percent of total sales for the Asia/Pacific region in 2015.



Demand for diesel engines in the Africa/Mideast region is expected to expand 7.7 percent per year through 2015, spurred by rising output of medium and heavy vehicles and off-highway equipment, in addition to rising fixed investment. Stationary diesel engines will continue to account for a relatively high proportion of the overall market due to the unreliability of electricity in the region, prompting the use of these products as backup generators. The diesel engine markets in Eastern Europe and in Central and South America will also grow at healthy rates from 2010 to 2015. However, each of these regions will still account for less than ten percent of global sales in 2015.

Demand for diesel engines in North America and Western Europe will grow with renewed strength following a period of weakness. Continued high levels of off-highway equipment production will maintain proportionally large demand for diesel engines in North America. In Western Europe, lower diesel fuel prices and differing cultural factors will maintain the popularity of diesel engines used in light vehicles. Market gains in Japan will advance only 2.3 percent per annum through 2015, dampened by slow growth in motor vehicle output, although this will represent an improvement over sales declines recorded between 2005 and 2010.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Diesel Engine Outlook

Dema… 0 bill… expanding … l be t… any major … en by… sales of lig… ise i… production … rucks… automobile… d di… prices rem… will … 14 percent p… addition… in both foreign and domestic sources of fixed investment wil… with the presence of large unelectrified rural areas to spur ad… 9.5 percent per annum in stationary diesel engine sales from … 2015. This market segment will reach $1.1 billion in 2015.

SAMPLE TEXT

The market for off-highway diesel engines in India will climb 7.6 percent per year to $2.1 billion in 2015, bolstered by healthy advances in production of agricultural, construction, and mining machinery as companies manufacturing, bolstered by multinational investment in new plants in this high growth market. In January 2012, for instance, Deere opened its first farm equipment factory in India, located in Sirhind, and also announced plans to build a tractor plant in Dewas, Madhya Pradesh.

Although the medium and heavy vehicle market segment will post the slowest annual rate of expansion from 2010 to 2015, den… these engines will still rise at a healthy 6.4 percent annual pa… ate increases in both production and stock of diesel-powered… and heavy trucks and buses will stimulate this growth, as co… strong economic expansion will boost demand for goods tra… services.

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TABLE VI-8

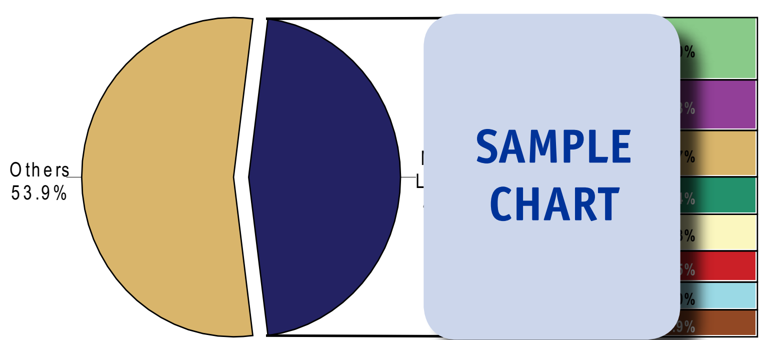
INDIA: DIESEL ENGINE DEMAND BY APPLICATION & PRODUCT (million dollars)

Item	2000	2005	2010	2015	2020
Motor Vehicle Production (000 units)					…0
$ MV diesel/motor vehicle					…0
Diesel Engine Demand					…0
By Application:					
Motor Vehicles					…0
Light Vehicles					…0
Medium/Heavy Trucks/Buses					…0
Off-Highway					…0
Stationary					…0
By Product:					
Engines					…0
Parts					…0
% India					…2
Asia/Pacific Diesel Engine Demand	2…				…00

SAMPLE TABLE

CHART VIII-1

WORLD DIESEL ENGINE MARKET SHARE ($142.5 billion, 2010)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE VI-7

INDIA: DIESEL ENGINE SUPPLY & DEMAND
(million dollars)

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009$)					
% fixed investment					
Gross Fixed Investment (bil 2009$)					
$ diesel/000$ fixed investment					
Diesel Engine Demand					
net exports					
Diesel Engine Shipments					
% India					
Asia/Pacific Diesel Engine Shipments					

SAMPLE TABLE

COMPANY PROFILES

Hyundai Heavy Industries Company Limited
1, Jeonha-dong
Dong-gu, Ulsan 682
South Korea
82-52-20
http://w

Sales: $
Employ

Key Pro ... neration, propulsion
and land ... es for power plants

SAMPLE PROFILE

Hyundai Heavy Industries (HHI), a leading global shipbuilder, manufactures tankers, carriers, container ships, offshore facilities, marine diesel engines and parts, industrial plants, electric power equipment and construction equipment. The Company operates in eight segments: Shipbuilding, Offshore and Engineering, Industrial Plant and Engineering, Engine and Machinery, Electro Electric Systems, Green Energy, Construction Equipment and Others.

The Company competes in the world diesel engine industry through the Engine and Machinery segment, which had 2011 sales of $2.8 billion. Through the segment, HHI produces and sells two- and four-stroke marine and other diesel engines, diesel and gas power plant engines, propellers, crankshafts, industrial and marine pumps, ballast water management systems, marine thrusters and industrial robots. As of 2010, the Company reported that it held a 35-percent share of the global two-stroke marine diesel engine market.

HHI produces HIMSEN diesel engines, diesel engines for power plants, and two-stroke marine diesel engines. HIMSEN diesel engines

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"... India maintained its status as a net importer of these products with a 2010 trade deficit of $870 million, equivalent to nine percent of the country's sales. Going forward, shipments of diesel engines in India are expected to climb at almost 11 percent per year, outpacing domestic sales and resulting in a shrinking of the trade deficit to $600 million, equivalent to four percent of local demand. Foreign investment in manufacturing capacity in India will continue to power this growth."
--Section VI, pg. 196

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Other Studies

World Tractors

World demand for tractors will rise 6.8 percent annually through 2016 to $122 billion. Gains in the Asia/Pacific region will be more than twice that of any other region, with China alone claiming nearly one-third of the global total. Agricultural tractors will remain the largest segment, followed by tractors for construction and mining applications. This study analyzes the $88 billion world tractor industry, with forecasts for 2016 and 2021 by market, product, world region and for 23 countries. The study also evaluates company market share and profiles industry participants.

#2984 .... February 2013 .... $6300

World Buses

The world market for buses will grow 5.0 percent annually to 632,000 units in 2016. Type C school buses will lead gains, due largely to rapidly expanding use in China. Transit bus demand will rise at the next fastest rate. The Asia/Pacific region will offer the best growth opportunities, with China and India alone accounting for three-fifths of all new bus demand. This study analyzes the 495,000 unit global bus market, with forecasts for 2016 and 2021 by type, world region and for 25 countries. The study also evaluates company market share and profiles industry participants.

#2933 .... November 2012 .... $6100

World Batteries

World demand for batteries is forecast to rise 8.1 percent annually to $132 billion in 2016. China will remain the largest market while India and South Korea will grow the fastest. Secondary batteries will outpace primary types, the former driven by uses in mobile phones, portable computers, and personal entertainment devices. This study analyzes the $89.4 billion world battery industry, with forecasts for 2016 and 2021 by product, market, world region and for 32 major countries. The study also evaluates company market share and profiles industry participants.

#2939 .... October 2012 .... $6500

Agricultural Equipment in China

Demand for agricultural equipment in China is projected to grow 10.8 percent annually to 225 billion yuan in 2015, driven in part by favorable government policies and improved access to equipment through cooperatives. Farm tractors will remain the largest segment while planting and fertilizing machinery and harvesting machinery grow the fastest. This study analyzes the 134.6 billion yuan agricultural equipment market in China, with forecasts for 2015 and 2020 by product and region. The study also evaluates company market shares and profiles market participants.

#2880 .... March 2012 .... $5400

World Fuel Cells

Global commercial fuel cell product and service demand will more than triple by 2015, and claim nearly half of all fuel cell spending (including R&D funding and investment) by 2020. Electric power generation will remain the largest application through 2015, while portable electronics and other uses will grow the fastest. This study analyzes the $780 million world fuel cell industry, with forecasts for 2015 and 2020 by product, chemistry, application, world region and for 15 countries. The study also evaluates company market share and profiles major players.

#2769 .... June 2011 .... $6100

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